https://www.financial-planning.com/video/advise-ai-2025/ai-at-every-touchpoint-transforming-the-client-meeting-lifecycle
Video: https://archive.org/details/2025-10-29-fp-advise-ai-ai-at-every-touchpoint-video
Photos: https://archive.org/details/2025-ADVISE-AI-photos

AI at Every Touchpoint: Transforming the Client Meeting Lifecycle
Oct. 29, 2025

From prep to follow-up, AI is redefining the way advisors engage with clients—and streamline operations. In this dynamic session, we'll explore how AI-powered tools are being integrated into every stage of the client meeting lifecycle, including pre-meeting preparation, real-time meeting assistants and note-takers, post-meeting summaries, CRM and financial planning system updates, and even action item tracking.

Learn how leading firms are leveraging AI to increase consistency, save time, ensure compliance, and improve client satisfaction—without sacrificing the human element. Whether you're a financial advisor looking to optimize your process or a leader shaping your firm's AI strategy, this session will provide real time use cases that are already transforming advisor workflows, leading to better efficiencies and more time spent on advice.